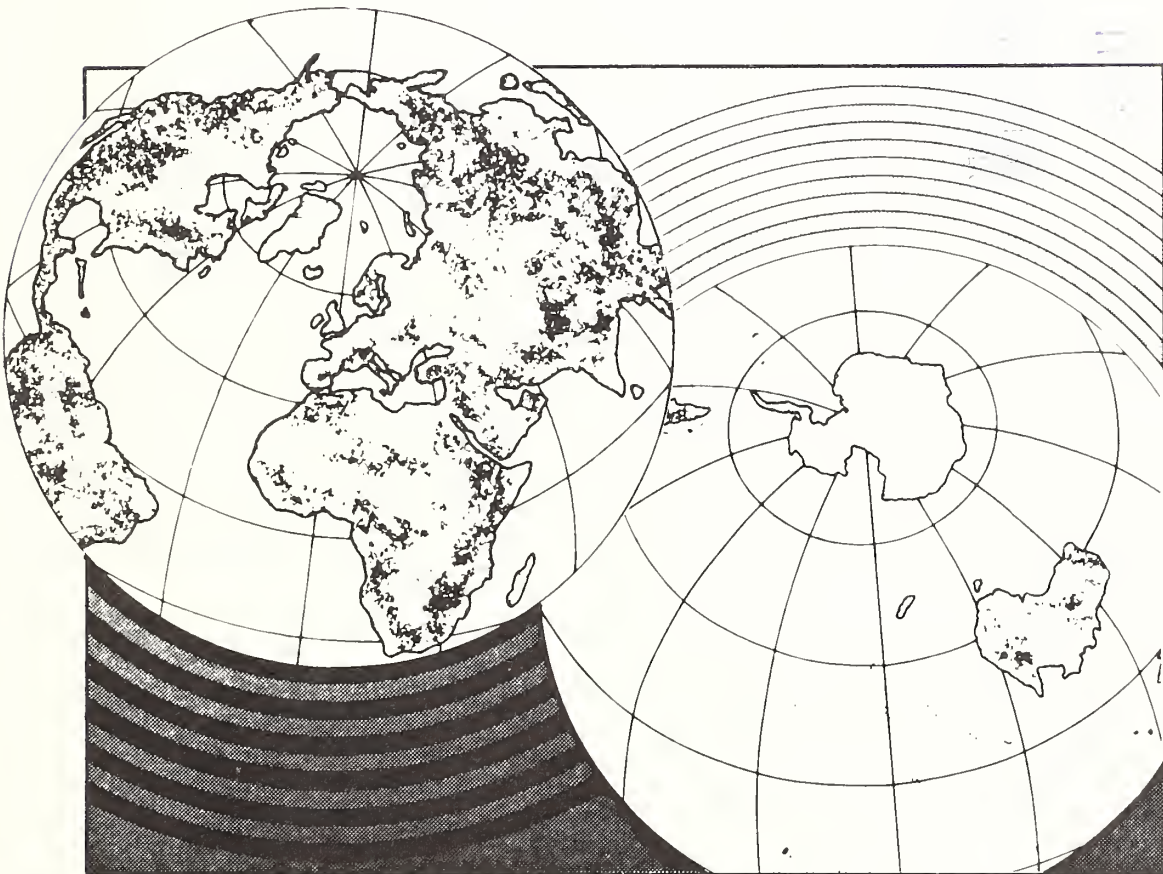


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Eastern Europe Agricultural Situation

Review of 1977 and Outlook for 1978



UNITED STATES DEPARTMENT OF AGRICULTURE

ECONOMICS, STATISTICS, AND COOPERATIVES SERVICE

APPROVED BY THE WORLD FOOD AND AGRICULTURAL OUTLOOK AND SITUATION BOARD

ABSTRACT: In 1977, agricultural production remained at the 1976 level. Grain production was near the 1976 level. Sugarbeets and sunflower output was up; rapeseed, soybean, potato and tobacco production was down. Livestock inventory, except for horses, increased. Total meat production increased 2 percent, but declined in Bulgaria and Poland. U.S. agricultural exports to the region dropped in 1977, but the prospect for recovery is good for 1978. Agricultural growth plans for 1978 range from 2 percent in Hungary to 9 to 16 percent in Romania.

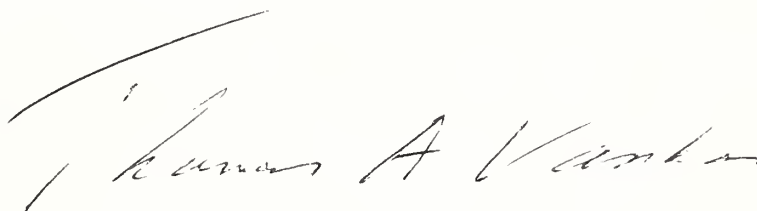
KEYWORDS: Eastern Europe, weather, crops, livestock, trade policy, agricultural trade, agricultural plans.

FOREWORD

This report reviews and analyzes major developments in the food-and-fiber sectors of Eastern Europe during 1977 and provides information on the outlook for 1978. Emphasis is given to agricultural developments of major concern to the United States, especially developments affecting the outlook for foreign trade of farm commodities.

The report updates and supplements data found in Foreign Agricultural Economic Report No. 134, *Eastern Europe Agricultural Situation, Review of 1976 and Outlook for 1977*. It is one of seven regional publications on the world agricultural situation. Other reports are being published on the USSR, Western Europe, the Western Hemisphere, Africa and West Asia, Asia and Oceania, and the People's Republic of China.

Sections of the report were written by Andrew A. Duymovic and Thomas A. Vankai. Carolyn E. Miller assisted in the compilation of statistical data. Information submitted by the U.S. Agricultural Attaches in Athens, Belgrade, Vienna, and Warsaw is acknowledged with appreciation.

A handwritten signature in cursive script, reading "Thomas A. Vankai". The signature is written in dark ink and is positioned above the printed name and title.

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ABBREVIATIONS AND TERMS

Abbreviations

CCC	=	Commodity Credit Corporation
CEMA	=	Council for Mutual Economic Assistance
EC	=	European Community
EE	=	Five-Year Plan
FAO	=	Food and Agriculture Organization of the United Nations
FYP	=	5-Year Plan
GDR	=	German Democratic Republic or East Germany
OECD	=	Organization for Economic Cooperation and Development
1977/78	=	July - June

Terms

Agricultural Land—Cultivated land, gardens, orchards, meadows, and pastures.

Agricultural Trade—Raw materials for food and fiber; feeds; and food and food products.

Eastern Europe:

Northern Countries—Czechoslovakia, German Democratic Republic, Poland

Southern Countries—Bulgaria, Hungary, Romania, Yugoslavia

Transshipments—United States exports destined to Eastern Europe unloaded in Canada or Western Europe and reported by the U.S. Census Bureau as exports to the port of entry.

Units

Metric units are used throughout:

One metric ton	=	2,204.6 pounds
One quintal	=	100 kilograms
One kilogram	=	2.2046 pounds
One hectare	=	2.471 acres

Conversion factors

Cowhides: one piece	=	20 kilograms
Milk: one liter	=	1.031 kilograms
Soybeans: one unit	=	79.5 percent soybean meal equivalent, or 18.0 percent soybean oil equivalent

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Eastern Europe Agricultural Situation

Review of 1977 and Outlook for 1978

SUMMARY

Eastern Europe's (EE) gross agricultural production in 1977 remained unchanged from 1976. The increased livestock production in EE offset declines in crop output and, consequently, widened the gap between feed requirement and domestic feed supply. Grain production, at about 93 million tons, was close to the 1976 results; and a good sunflowerseed crop, in the southern countries, offset the shortfall of rapeseed in Poland. Sugarbeet output was record large, while potato and tobacco harvests were down. Potatoes, an important feed for hogs in Poland, were down by 9 million tons. This shortfall, in addition to the 1.5 million-ton decline in grain production, further aggravated the Polish feed situation.

Except for the decline in horse numbers, livestock numbers were up in every category. Total meat production, though up 2 percent in the region, was down in Poland and Bulgaria. Polish farmers stopped slaughtering young stock and began rebuilding herds. Meat consumption appeared to be stabilized, although demand in Poland was not met and caused sporadic shortages. However, relaxation of price restrictions on privately sold meat improved the market supply.

Due to the large Polish grain requirement, total regional grain imports during 1977/78 remain large at an estimated 13 million tons; however this 2.6 million tons below the record set in 1976/77. The oil meal imports of about 3.3 million tons in 1977 were sharply lower than in 1976; an increase in 1978 is likely.

After several years of expansion, U.S. agricultural exports to EE dropped from \$1.4 billion in 1976 to under \$.9 billion in 1977. The decline reflected both reduced export volume and lower prices. Grain continued to account for the largest share of total shipments, followed by oilseeds and oilseed

products. Exports may rise to \$1.1 to \$1.2 billion during 1978 because of increasing EE demand for oilseed products, coupled with lesser competition from oilseed exporting nations. In addition, authorized Commodity Credit Corporation (CCC) credit lines of about \$535 million should stimulate U.S. agricultural sales to Poland and Romania.

The EE trade deficit continued to mount in 1977, but at a slower pace. The primary causes of the deficit are the deteriorated terms of trade, the eagerness to supply increasing quantities of meat to the population at artificially low prices, and the lagging agricultural production which was not able to satisfy the rising demand for feed. The indebtedness constitutes serious constraints in import decisions. The value of imports in 1978 will hinge on the exporters' willingness to extend further credits and/or the EE countries' ability to raise their exports.

The Eastern European planned agricultural production increases for 1978 range from 2 percent in Hungary to 9 to 16 percent in Romania. Crop production is slated to grow faster than the expansion in the livestock sector. Grain output is being encouraged in order to reduce imports. The aggregate plan target of a 103 million ton grain output represents a 10-million ton increase over the 1977 level. While grain imports may be cut if plans are fulfilled, an increase in protein feed imports is likely. Expansion in the mixed feed industry, the strive for more efficient feeding, and the limitations on domestic oilseed production substantiate this forecast. However, the import ratio between grain and protein feed will be influenced by the world price differentials of the individual commodities. Livestock producers are expected to continue to rebuild animal inventories, and meat production may increase moderately above 1977 levels.

ERRATIC WEATHER HALTED PRODUCTION GROWTH

Gross Agricultural Production in 1977 Unchanged from 1976's Level

Preliminary USDA estimates indicate that 1977 gross agricultural production remained near its 1976 level. Increases in agricultural output in Czechoslovakia, the German Democratic Republic (GDR), Hungary, and Yugoslavia were offset by declines in Bulgaria, Poland, and Romania. Hungary and Yugoslavia set records. Romanian production fell far short of the exceptionally good harvest in 1976; Poland and Bulgaria were hurt seriously by the weather. The declines in output were in crops; livestock production was up about 1.5 percent.

Heavy Summer Precipitation Hurt Poland Most

Weather, always a major factor in crop production, was erratic throughout the crop year but caused serious shortfalls only in Poland and Bul-

garia. The fall-sown crops wintered well throughout EE. Following the mild winter, spring arrived early in 1977. Vegetation and field work started in February. April turned cool and retarded plant growth. Sporadic frosts damaged fruit trees in the GDR, Hungary, and Yugoslavia. The month of May favored crop development and harvest prospects became good. Heavy summer rains, however, caused lodging and harvest losses in Czechoslovakia, the GDR, and in Poland. The rain damaged Polish crops the most, and flooding inundated several hundred thousand hectares of land in that country.

Poland's experiment with corn production suffered from lack of adequate sunshine. High moisture content, which caused deterioration in quality of wheat, induced Polish officials to relax standards for quality discounts. September was cool. Frost damaged late-ripening corn in Hungary; drought in south and east Romania reduced the yields of fall harvested crops. Drier-than-average weather prevailed throughout the year in Bulgaria.

GRAIN OUTPUT AT 1976 LEVEL, BUT DOWN SIGNIFICANTLY IN POLAND

Regional 1977 grain output, at about 93 million tons, remained at the previous year's level. Czechoslovakia and Hungary had near-record harvests, and Yugoslavia record grain harvests, while results in the GDR were somewhat better than the poor 1976 crop. Romania had a good year, though below 1976's exceptionally large crops when the results were probably inflated by high water content. The Polish grain shortfall was 1.5 million tons, compared with the 1976 output, and 3 million tons less than planned for 1977 (table 8).

The region's harvested grain area has been stable at about 29 million hectares since 1973. Compared with the 1976 level, the area declined in Hungary, and Yugoslavia, and increased in Poland. However, the 8 million hectares sown to grain in Poland are still short of the planned 8.5 million hectares (table 7). Wheat acreage compared with the total regional grain area declined due to difficulty in completing planned sowing in Romania and Yugoslavia. Despite the reduced area, improved yields helped to match the 1976 production of 34 million tons.

Grain Imports Lower in 1977/78

Grain imports in 1977/78 are estimated at 13 million tons, 2.6 million below the 1976/77 level.

The exports of 4 million tons will be higher than in 1976/77 (table 1). The long-range goal of the southern countries is to continue to export grains, while the northern countries plan to reduce imports gradually. Hungary and Romania were regular net exporters of grain during the 1970's, and Yugoslavia will join their ranks in 1977/78. Czechoslovakia is nearly self-sufficient, while the goal of self-sufficiency is a long way from being realized in the GDR and Poland.

Poland, especially hard hit by the weather, plans to import 7 million tons of grain in 1977/78, its largest quantity ever. The 1-million-ton increase in Polish imports above the 1976/77 level is needed because of increases in hog numbers and the serious decline in grain and potato production. The total feed requirement cannot be covered because of transportation and handling problems. Pasture and forage yields were the only bright spots in Poland and, that production, can substitute for some grain in cattle feeding. The GDR grain import requirement is estimated at 3 to 3.5 million tons.

Close to two-thirds of the grain produced in the region is used for feed; consequently, domestic production normally covers the nonfeed use. Because of poorer quality in 1977, some wheat will be

imported for food use. Since the bulk of grain imports are for feed, the GDR and Poland may elect to buy more corn than wheat from the United States.

The United States is expected to increase its share in the EE grain market during 1977/78, especially in Poland, due to a \$500 million CCC credit. Other known sources of Polish grain imports are Eastern and Western Europe, Canada, Sweden, the USSR, and Turkey. Poland, in 1977, signed a 3-year agreement with Sweden for 300,000 tons of wheat imports annually and with France for 600,000 tons of grain to be delivered between August 1977 and July 1978. This latter agreement is subject to annual renewal. Poland has additional agreements with Canada, Argentina, and an "understanding" reached in 1975 with the United States for 2 to 3 million tons of grain imports annually, at least until 1981. The USSR exported about 500,000 tons of grains to Poland in the first half of 1977, but no information is available on 1977/78 USSR grain sales. EE's southern countries traditionally export grains to the northern countries, these exports may reach 1 million tons in 1977/78. In addition, Hungary and Yugoslavia may each export about half a million tons of grain to the Soviet Union.

U.S. grain exports to EE grew steadily in the last few years due largely to the stagnation of Polish grain production during the last 4 years, while their livestock sector expanded. Also, the USSR relinquished its dominant role in exporting grains

to EE. In the first half of 1977/78, the United States exported 2.2 million tons, just slightly below one-third of exports forecasted for this crop year.

Outlook Uncertain to Meet Ambitious Grain Production Plans for 1978

Agricultural policy in all countries of the region is geared to increasing grain production. The most important means to achieve these goals include expanding the area sown to grains, improving varieties, and using more fertilizers and plant-protecting agents, as well as enlarging production units. Poland's major effort in giving priorities to agriculture is demonstrated by diverting investment funds from other economic sectors, contrary to the allocations defined in the 1976-1980 plan.

The outlook for grain production in 1978 is not clear at this time. Fall-sown grains makeup just two-fifths of the total grain area. Poland increased its fall sowing by 5 percent, compared with a year earlier. Increases are reported for Romania and Yugoslavia, too. Wet conditions in the GDR and Poland delayed sowing beyond the optimal time, but the long fall provided ideal conditions to complete the work. Soil moisture in September and October was low in Hungary and in South and East Romania, causing uneven sprouting. November rains in Hungary and intensive irrigation in Romania remedied the situation somewhat. (Thomas A. Vankai)

OILSEED PRODUCT IMPORTS TO INCREASE IN 1978

Domestic Oilseed Production Unchanged in 1977

Production of major oilseeds—sunflowerseed, rapeseed, and soybeans combined—remained at the 1976 level despite an 84,000 hectare increase in sown area. In Poland, heavy summer rains reduced the rapeseed crops; in Bulgaria and in Romania, drought diminished sunflower and soybean harvests (table 10). In contrast, growing conditions in Hungary and Yugoslavia favored sunflower production. In Yugoslavia, higher producer prices for sunflower and soybean in the fall of 1976 served as an incentive to expand sown area in 1977. Also, the new higher-yielding sunflowerseed variety planted on 100,000 hectares contributed to the record output.

Imports of Oilseed Products Declined in 1977

The regional supply of oilmeal—from 1975 domestic production and 1976 imports—peaked in

1976 but declined sharply in 1977 largely because of an estimated 700,000 ton decline in oilmeal imports (table 2). The decline in oilmeal imports can be explained by an apparently large carryover of oilmeal stocks into 1977, lower demand for feed caused by a 4 percent decline in hog inventories during 1976, and prices which favored corn imports relative to oilmeals.

Soybean meal, which usually dominates the region's oilmeal imports, accounted for 75 to 80 percent of total meal; about half of this used to be supplied by the United States. The U.S. share of soybean meal imports dipped below one half in the last 2 years, reflecting the Brazilian penetration of the EE market; however, because a substantial volume of U.S. soybean meal arrives in EE via transshipment, a discrepancy exists between the United States export and the recipient countries' import data (table 3).

Peanut meal, mostly imported from India, accounted for 0.5 million tons in 1976. Both the peanut meal and fish meal imported by EE—usu-

ally about 0.5 million tons each annually—declined in 1977 because of a decline in Indian peanut production and the recurring problems with Peru's anchovy catch.

In addition to being a considerable importer of oilmeals, EE is a net importer of oilseeds and vegetable oils, as well. Romania is the region's largest soybean importer. The northern countries import sunflowerseed and soybeans and export rapeseeds. Hungary is a small exporter of sunflowerseed.

While the United States is the principal supplier of soybeans to EE, it also exported 40,000 tons of sunflowerseed to Czechoslovakia in 1977.

Vegetable oil imports in 1977 are likely to remain in the range of the level in 1976 (table 13). The annual variation is influenced by the domestic crop and by the alternative choice of importing seed or oil. Consumption of vegetable oil is slowly trending upward. The vegetable oil imports from the United States declined to 1,000 tons in 1977, compared with 16,000 tons in 1976.

Heavy Reliance on Imported Protein Feed

The heavy reliance on Western sources for protein feed and the consequent drain on hard currency holdings concern all EE countries. Joint research among the CEMA members may soon lead to the commercial production of synthetic protein feed. Experiments are now underway to develop high protein grain varieties. The growing of more alfalfa and pulses is being stimulated. The treatment of straw with carbamide and urea is widespread, especially in the GDR. More emphasis is being placed on the utilization of slaughter byproducts and kitchen waste, and on the production of milk powder and dried yeast for feed.

Increased Imports and Uncertain Production is the Outlook for 1978

The import requirement for protein feed has increased in 1978 because of the anticipated increase in hog numbers and the expansion of the mixed feed industry. The volume of imports will be influenced by the oilseed-grain price ratio.

A shift in imports from meal to seed is likely. Yugoslavia opened a new soybean processing plant in July 1977, and enlargement of crushing capacity is in progress in Bulgaria and Romania. Romania has contracted with U.S. companies for imports of 200,000 tons of soybeans and is negotiating for additional purchases. Poland and Romania received CCC credits for the importation.

U.S. exports of oilmeal to the region are expected to surpass 1 million tons in 1978; between October 1 and mid-March, exports topped the half million ton level.

Brazil, the principal U.S. competitor in the market, has a large positive trade balance with these countries and is unlikely to grant concessional credit terms to EE, particularly because of Brazil's reduced harvest prospect in 1978.

The outlook for EE's 1978 domestic oilseed production is uncertain. Alternate freezing and thawing last winter was detrimental to the Polish rapeseed crop. While some expansion in the soybean area is scheduled in the southern countries, it is not likely that the increase in domestic oilseed production will match the growing demand in the near future. Oilmeals, which account for about 7 to 9 percent of total concentrates fed in EE, are still below the optimal feed rations used in Western developed countries. (*Thomas A. Vankai*)

OTHER CROPS

Potatoes

EE area planted to potatoes has been trending downward somewhat through 1976. Because of poor crops in 1975 and 1976, the area stabilized somewhat in 1977 at nearly 4 million hectares. Although the area did not change significantly, EE's 1977 potato crop, at 63.8 million tons, was about 9 percent below the year-earlier level. In addition, the 1977 harvest was about 11 million tons lower than the average of 74.9 million tons achieved during 1972-1974 (tables 9, 10).

The disastrous Polish crop was responsible for the overall reduction in potato production. Rains and floods reduced Poland's 1977 potato crop to 41.3 million tons, 17 percent less than in 1976. Poland's crop accounted for nearly two-thirds of the 1977 regional total compared with 71 percent in

1976. Poor yields substantially reduced Romania's potato output, while favorable weather contributed to considerably larger crops in the GDR and Hungary, and a moderately larger one in Yugoslavia.

Existing wet conditions during harvest were another detrimental factor in Poland, which resulted in poor quality potatoes and a high rate of spoilage. Combined with the smaller crop, the potatoes-for-feed situation for 1977/78 is tight, increasing Poland's import requirement for feed grains.

Sugarbeets

Although plantings stabilized in 1977, sugarbeet production in EE reached a record of nearly 50 million tons, or 15 percent above the 1976 crop. While Poland's overall agricultural performance was poor

in 1977, production of sugarbeets reached a record 16 million tons, 6 percent more than in 1976. Poland's excessive rainfall last summer reportedly caused enough of a decrease in sugar content to prevent sugar production from increasing. Output in the GDR also reached a record high following a disastrous 1976 crop, and Czechoslovakia's substantial increase resulted in a near record beet output.

Except for Yugoslavia, the southern nations all had lower sugarbeet production. Yugoslavia's moderate increase in sugarbeet prices in 1976 appears to have encouraged producers to expand production. In 1977, planted area increased substantially at the expense of corn and wheat. The record sugarbeet crop showed a 12 percent increase above 1976. Refined sugar production is expected to cover domestic needs during 1977/78. Although Romania's harvested area increased moderately in 1977, beet production was off about a tenth from the record in 1976. Drought also caused a sharp drop in neighboring Bulgaria's sugarbeet production. Hungary's output of beets was off slightly in 1977, but higher sugar content allowed Hungary to achieve near self-sufficiency in sugar.

Fruits and Vegetables

Variability was the predominant characteristic of 1977 fruit and vegetable production in EE. Results were mixed in Romania where summer drought and an earlier-than-usual killing frost in the fall lowered prospects. Romania's production of field vegetables was off a tenth, and quality was reported to be low. On the other hand, fruit production was up more than a tenth, while grape production was down slightly. Grape quality, and consequently wine production, was poor due to the earlier-than-usual frost.

Rainfall and hail storms in Bulgaria cut production of some fruit to the lowest level in several years. Grape production, at 867,000 tons, was nearly three-tenths below the 1976 crop.

Favorable growing conditions in Yugoslavia during the June-September period allowed growers to harvest an average plum crop, well above 1976's poor showing. The sharp turn-around in plum production accounted for most of Yugoslavia's 5 per-

cent increase in deciduous fruit production. Exports of dried prunes will also rebound in 1977/78, with about two-thirds of total exports expected to go to the main buyer of Yugoslavia's dried prunes—the USSR. A bilateral trade agreement from 1976 to 1980 calls for Yugoslavian exports of 8,000 to 12,000 tons of dried prunes to the USSR annually.

During 1977, supplies of fruits and vegetables improved substantially in Hungary. Vegetable production reportedly exceeded existing processing capacity, putting downward pressure on fresh market prices. Consequently, planted area for processing vegetables for 1978 is expected to drop about 4,000 hectares, according to the Government plan.

While vegetable production in the northern countries increased, fruit production was off sharply in Poland and off slightly in Czechoslovakia. The reduction in Poland is largely due to the 20 percent smaller apple crop. The apple crop in Czechoslovakia was off about 7 percent.

Tobacco

The region's 1977 tobacco crop dropped about one-fifth below the record 458,000 tons produced in 1976. The substantially smaller crops in Bulgaria, Poland, Romania, and Yugoslavia were responsible for the drop. Bulgaria, EE's leading tobacco producer, reportedly produced 106,000 tons of oriental-tobacco, about one-quarter less than in 1976. The reduction in output was due to hail damage during the growing season.

Oriental-tobacco accounted for 85 percent of the total Bulgarian tobacco crop during the 1974-1976 period. The best quality oriental tobacco is produced in South Bulgaria, near the Greek border, and in Southwest Bulgaria, near the Yugoslav border. Only 15 percent of the Bulgarian tobacco is produced on State farms because practice has shown that large State farms have not been successful in tobacco production. Bulgaria has an advantage in its cigarette production and sales among the CEMA countries. The absence of duties and the special production or distribution arrangements within CEMA help keep Bulgaria the major tobacco and cigarette supplier to EE, and particularly to the USSR. (*Andrew A. Duymovic*)

LIVESTOCK SECTOR RECOVERING

EE's livestock sector in 1977 was generally characterized by producers rebuilding animal inventories following the substantial reduction in herds during 1976—particularly in the hog sector. In addition, total meat production in the region increased slightly in spite of small reductions in

Poland and Bulgaria. To satisfy consumer demand for red meat, domestic supplies were supplemented with substantial quantities of imports, particularly beef from Australia. Output of milk and eggs continued to trend upward.

Weather reduced anticipated feed output in Bul-

garia, the GDR, Poland, and Romania. Government officials of these countries plan to provide adequate quantities of feed grains and protein meals to assure that necessary supplies are available to continue the recovery in the livestock sectors during 1978. Increases in forage output during 1977, and vastly improved pasture conditions last summer in most countries of the region, compared with the poor conditions of 1976, were bright spots in the animal feed complex. The increased supply of forage crops did reduce the pressure somewhat on grain and protein feed supplies in the northern countries. However, because of excessive rainfall during harvest, the quality of silage has been reduced somewhat.

Production of straw pellets continued its upward trend in the GDR, increasing 5 percent to 1.5 million tons in 1977. A smaller and poorer quality potato crop is having an adverse impact on the rate of recovery of Poland's livestock sector.

With adequate feed supplies apparently assured during 1977/78, and with the Government's attempt to provide proper incentives for livestock producers, animal numbers for the region are generally expected to continue to expand in 1978. Meat production is also expected to increase moderately above 1977 levels. Imports of meat will continue, but at a level lower than recorded in 1977.

Two-Tier Retail Meat Prices Allowed in Poland

Meat prices in the State retail shops of Poland have been stable for the last 10 years. Efforts to raise these prices in the past have led to riots and Government decisions to cancel price increases. To maintain fixed consumer prices and keep farmers operating profitably, the Government must pay large subsidies on meat and other important foodstuffs. Increased meat consumption combined with rising producer prices, resulted in rising subsidy costs.

During 1977, "commercial" stores were introduced and reportedly expanded rapidly across the country. These stores feature better meat selection, trimmed cuts, and higher quality than that in State run outlets, now referred to as "regular" shops. Prices in the "commercial" shops are nearly twice those in the "regular" shops. For example, late in 1977, pork loin sold at 106 zlotys (zl.) per kilogram in the "commercial" shops vs. 58 zl. in "regular" shops. The new shops apparently are enjoying success, as many Polish shoppers prefer to pay higher prices, buy less meat per store visit, and be assured of adequate supplies, rather than wait in line for hours at the less expensive "regular", shops. The "commercial" shops, and consequently the two-tier pricing scheme, are expected

to continue to increase in popularity with tacit Government approval.

Livestock Numbers Expanding

Virtually all EE countries experienced moderate growth in livestock inventories during 1977, with the notable exception of Romania (table 11). Several factors were responsible for this overall expansion: adequate feed supplies; improved pastures; larger forage production in most countries; Governments' desire to expand meat production to satisfy consumer demand as well as to expand exports of meat products; and improved profitability for livestock producers.

Hog numbers in the region totaled about 69 million head on January 1, 1978, about 8 percent above the reduced level of a year earlier. The sharpest increase occurred in Poland, where hog numbers totaled 20.6 million, 23 percent above January 1, 1977. But the latest inventory is still slightly below the 21.7 million reached on January 1, 1975. Increased feed supplies and, perhaps more important, increased producer prices back in July 1976 served to stimulate Poland's recovery of hog numbers.

Czechoslovakia and Yugoslavia also registered significant increases in hog numbers, while declines occurred in Romania and Bulgaria. Romania's difficulties stemmed from the poor quality corn crop of 1976, which had a disastrous effect on its swine industry during 1977. Official sources indicated high levels of aflatoxins in the corn caused low fertility, as well as a 14-percent mortality rate for piglets.

Total cattle numbers for EE increased more modestly to 38.2 million head on January 1, 1978, compared with 37.7 a year earlier. Slight increases in all of the countries more than offset slight declines in Romania and Yugoslavia. Sheep numbers for the region increased slightly and totaled 40.6 million head. Yugoslavia was the sole country showing a drop in sheep numbers. Slaughter rates were high because the industry lacks incentive to expand. Expansion in EE's poultry industry continued in spite of a moderate drop in Romania.

1978 Recovery of Polish Hog Numbers Jeopardized

All EE countries expect inventories of livestock to expand during 1978. The only question mark is Poland, where the anticipated recovery of hog numbers has been jeopardized. The poor 1977 grain and potato harvest has created some uncertainty for the outlook of Poland's hog sector in 1978. The shortage of potatoes, which is an important feed ingredient used by hog producers, and resultant high prices for potatoes and lower profitability

could discourage private farmers. This would indicate a possible reduction, or slowdown in the recovery, of swine numbers from present levels. These negative effects will be lessened somewhat if grain imports reach record levels during 1977/78.

Another important factor, which may soften the negative impact of high potato prices, is the presence of "commercial" retail stores. Without these shops and their higher prices, many private hog producers in Poland would be hard pressed to stay in business. It now seems they have more incentive to produce for the "commercial" retail shops. Consequently, hog numbers in Poland should continue to increase during 1978, but at a slower rate than previously anticipated.

The fact that the effects of Romania's poor quality 1976 corn crop appear to have passed will be of particular importance in rebuilding swine and poultry numbers. In Yugoslavia, hogs should continue their upward trend during 1978 due to the strong domestic demand for pork and the good prices being offered for slaughter hogs.

Meat Production Up Slightly in 1977 Recovery to Continue in 1978

EE's total meat production in 1977, at 10.9 million tons, was 2 percent larger than in 1976. Red meat production (excluding poultry) totaled 9.3 million tons, just 1 percent above 1976, but below the 9.5 million tons reached in 1975. Although down in Poland, pork production in the region increased slightly to 6.1 million tons. This was below the high of 6.3 million tons produced in 1975. Beef and mutton production, on the other hand, dropped slightly in EE. Declines in red meat production in Bulgaria and Poland were more than offset by increases in other countries of the region—particularly in Hungary. Meat production in EE is likely to increase moderately in 1978, as livestock sectors in most countries are expected to continue to recover, particularly in the GDR and Poland.

Poultry meat production registered another increase during 1977, reaching 1.6 million tons, compared with 1.5 million the year before. However, the annual rate of growth dropped to 6 percent during 1977 from a 10-percent increase achieved in 1976. EE is a net exporter of poultry meat, with Hungary being the largest exporter in the region. Current estimates put Hungary's 1977 poultry meat exports, at 123,000 tons, up at least 20 percent over 1976. This level would be almost double the volume attained 5 years ago.

The USSR, the GDR, and some Western European countries—West Germany, Switzerland, Austria, and Italy—are major markets, which absorbed nearly three-quarters of Hungary's poultry exports in 1977. However, the Middle East market is emerging as a growing outlet. Kuwait, Saudi Arabia, Lebanon, and Jordan took an estimated quarter of all Hungarian poultry meat exports in 1977. It is expected that Hungarian poultry exports will increase moderately in 1978, with much of the increased volume moving into Middle East markets.

In order to supplement domestic red meat supplies, EE imported about 70,000 tons (product weight) of beef from Oceania, mainly Australia. Reports also indicated Argentina and Brazil increased sales of beef to EE. Most of these imports went to Poland. EE is expected to purchase about 60,000 tons of beef from Australia in 1978. Some quantities of pork will also be imported to supplement domestic red meat supplies.

The drop in Poland's meat production during 1977 also had an adverse impact on its exports of meat and meat products. Available Polish data for 1977 indicate total fresh meat and bacon exports were down about 12 percent, compared with a year earlier. Canned meat exports were off 6 percent; poultry meat, about 12 percent. In order to maintain hard currency earnings, Poland's export of canned hams was down just 3 percent.

Exports of livestock and livestock products are important to Hungary, accounting for about half of the total agricultural exports of \$1 billion in 1977. With the recovery of Hungary's livestock sector, Hungarian exports of slaughter cattle were up slightly, while slaughter sheep and hog exports increased sharply. In addition, exports of processed meat increased sharply during 1977.

Yugoslavia's exports of beef and veal were down slightly in 1977, largely because of reduced shipments to the European Community (EC); although sales to Greece, Yugoslavia's major beef market, remained high. Even though the EC Council of Ministers recently gave a special beef and veal quota of 12,000 tons to Yugoslavia at a reduced levy for 1978, Yugoslavia's exports to the EC are not expected to improve materially. In 1977, the EC imported about 14,000 tons of beef and veal from Yugoslavia. However, as domestic production increases, total exports of Yugoslavia's beef and veal are expected to recover in 1978. (*Andrew A. Duymovic*)

INDEBTEDNESS AND TRADE POLICY

Hard Currency Borrowing Continues

EE continued heavy foreign borrowing in 1977 to sustain the high level of imports needed to maintain the standard of living. The region's total hard currency debt is estimated to have increased by \$4 billion during 1977, reaching about \$30 billion by the end of the year, based on the fragmentary information available.

The region's trade deficit with the rest of the world—hard currency and ruble—amounted to \$8 to 9 billion in 1977. This was partially offset by about \$2 billion in remittances by EE immigrants and Yugoslavian workers in the West, by a \$400 to 500 million surplus from tourism, and by some service earnings. However, the outflow of interest payments on past debts was about \$2 billion. The regional annual trade deficit had peaked at \$9.6 billion in 1975, then declined somewhat in 1976 and 1977 (table 4).

A country's degree of indebtedness is commonly measured by the ratio of debt to the value of its annual exports, its Gross National Product (GNP), or to its population. According to these measures, indebtedness is greatest in Poland, while Czechoslovakia has the best standing in the region.

The raw material price runup on the world market since 1973, the upward revision of intra-CEMA trade prices in 1975, and a series of EE crop shortfalls were the underlying factors of the indebtedness. The domestic supply-demand situation became aggravated by the reluctance of the respective governments to raise retail prices to stem domestic consumer demand. In addition, the slower-than-anticipated recovery from recession in western countries reduced the region's export potential to the industrial West.

The method of financing trade deficits varies by countries. Bulgaria, Czechoslovakia, and Hungary prefer hard currency bank loans and project-oriented credits. Poland makes more extensive use of commodity credits granted by foreign exporters. Bulgaria and Hungary are the region's largest recipients of medium and long-term Euro-currency credits.

USSR Became a Creditor

Reduced exports to the West stimulated trade within CEMA member nations, and the higher trade volume on higher prices raised the share of intra-CEMA trade since 1975. Bulgaria is the most closely tied to CEMA, with three-quarters of its trade conducted with CEMA members. Czechoslovakia and the GDR are next, each with two-thirds of intra-CEMA trade. About half of all Romanian and Yugoslavian trade and Polish

imports are transacted outside CEMA (table 5).

Most of the EE indebtedness within the CEMA trade occurred vis-a-vis the USSR. Only Poland and Romania—endowed with abundant natural resources—succeeded in maintaining a positive trade account with CEMA countries since 1974. Between 1974 and 1976, the USSR share of the total EE trade deficit grew from 3 percent to about 11 percent.

Agricultural Trade Deficit

Almost one-third of the total EE trade deficit is due to the imbalance in agricultural trade. Estimated agricultural imports were \$9.6 billion and exports \$6.8 billion in 1976 (table 4). Data for agricultural trade are not yet available for 1977. Bulgaria, Hungary, and Romania are regular net exporters of agricultural products; all other countries in the region are net importers. Bulgaria is the leading exporter of agricultural commodities, followed by Hungary and Poland. The GDR is the leading importer of agricultural commodities, followed by Poland and Czechoslovakia. Agricultural imports have become a special burden for the Polish economy, because 4 years of unfavorable weather reduced Poland's agricultural output.

CEMA-EC Negotiations Stalemated

While high level discussions last September between CEMA and EC officials did not result in any tangible agreements, the meeting appears to have led to a better understanding of the respective positions and has kept doors open for further dialogue in 1978. CEMA is pressing for recognition of its organization as a spokesman for its member countries, as well as for the expansion of cooperation and elimination of trade discrimination. The EC is not willing to recognize CEMA as an equal trading partner, because CEMA is a loose association without a common trade policy or institutionalized authority to speak with a single voice. The EC is suggesting a modest beginning by formalized cooperation in the environmental sphere, transportation, and in information exchanges.

Prospects Dim for Reducing Debts in 1978

There are few politically and socially feasible options available that would avoid further debt. The alternatives of reducing imports, increasing exports, and raising retail prices to dampen demand, would require belt tightening by consumers. However, eventually all countries in the region will likely be forced to take remedial actions despite the unpopularity of such actions. Expan-

ding exports to the West—though a favorable alternative—would be hindered by the sluggish economic recovery there.

Northern countries, the principal agricultural importers, are committed to holding down retail food prices; consequently, imports of foods and feeds cannot be curtailed significantly if shortages are to be avoided. Poland, after having a serious shortfall in feed production, is committed to import unprecedented quantities of grain in 1978 to avoid distress slaughter of livestock.

Despite price controls, Yugoslavia allowed some retail price increases for bread and meats. Czechoslovakia and Hungary raised the prices of non-

essential foods such as coffee, chocolate, and tropical fruits. While these measures may check imports, acceleration of EE exports to the West is unlikely at present.

Actually, a further deterioration of EE trade balance is expected during 1978. The CEMA debtors have a good repayment record so far. The creditors have generally believed that the individual countries operate under an umbrella for which the USSR is holding the pole. It has been assumed that default is unlikely because the credit worthiness of all CEMA members would be put in danger if any one country reneged on its obligation. (*Thomas A. Vankai*)

U.S. AGRICULTURAL TRADE WITH EASTERN EUROPE

U.S. Exports Off in 1977

After several years of continuous and rapid expansion, U.S. agricultural exports to EE dropped substantially in calendar 1977. The value of U.S. farm sales, adjusted for transshipments, dropped below the one billion dollar level in 1977 to \$873 million, or 37 percent below the record \$1.4 billion set in 1976 (table 14). Preliminary estimates indicate U.S. exports to EE are likely to rebound in calendar 1978 to the \$1.1 to \$1.2 billion level.

Major factors responsible for the sharp decline in U.S. farm exports to EE in 1977 include the recovery of EE grain production during the last 2 years, particularly in 1976, which resulted in a lower import demand for feed grains during calendar 1977. In addition, the mounting trade debt accumulated by many of the EE countries forced these nations to limit their purchases from the West in order to improve their respective trade balances.

Transshipments, particularly through West Germany, continue to play an important role in U.S. farm sales to EE. In 1977, transshipments totaled \$270 million, or 31 percent of total U.S. agricultural exports, compared with one-third in 1976. More than three-quarters of the transshipments go to the GDR (table 6). Virtually all transshipments to EE are represented by corn, wheat, soybean meal, and soybeans.

Grain continues to account for the largest share of total agricultural shipments. About half the value of all U.S. agricultural exports to EE in 1977 was in grain, with corn, the most important commodity, valued at about \$310 million. The quantity of U.S. grain exports to EE dropped to 4.4 million tons, well below the high of 7.4 million tons in calendar year 1976 and just under the 4.7 million tons in 1975.

Imports of U.S. soybeans totaled about 233,000 metric tons in 1977, compared with 277,000 the pre-

vious year. Soybean meal imports from the United States also dropped substantially to 1 million tons. Because of higher unit prices, the drop in the value of soybeans and soybean meal shipments, which totaled \$280 million, was not as sharp as the declines in volumes. Significant increases did occur in 1977 for U.S. exports of hides and skins (particularly cowhides), dairy breeding cattle, and tobacco.

Although Polish imports from the United States dropped significantly in 1977, Poland was still by far the largest EE customer of U.S. agricultural goods, accounting for \$312 million, or 36 percent of our agricultural exports to the region. The GDR and Romania also were important customers of U.S. agricultural goods in 1977.

U.S. agricultural imports from EE increased 4 percent during 1977 to \$286 million. Processed meat—mostly canned hams and pork products—continues to dominate these U.S. agricultural imports, accounting for about two-thirds of the total taken from EE, particularly from Poland, Yugoslavia, and Hungary. Because of Polish production difficulties, U.S. imports of processed meat from EE dropped slightly in 1977.

However, in recent years, EE's exports of canned hams and pork products to the United States increased substantially, as exports to the United States from other traditional suppliers dropped. Specifically, Denmark and Holland have gradually been increasing their trade network in canned hams and pork products in the EC in lieu of the U.S. market. If this trend continues, additional opportunities will open for EE exports of processed meat to the United States (table 15).

United States Exports to Rebound Somewhat in 1978

The value of U.S. agricultural exports to EE should increase in 1978 to the \$1.1 to \$1.2 billion level. The expected increases in the volume of

grain, soybeans, soybean meal, and cotton will more than offset the anticipated lower world prices for these commodities.

The sharp decline in Poland's 1977 grain production is largely responsible for that nation's larger grain import prospect for 1978. The Government of Poland has indicated its desire to import 4 to 5 million tons of grain this year from the United States, well above the 2 to 3 million tons specified in the U.S.-Polish grain understanding signed in November 1975. The growth in EE's livestock sector, anticipated for 1978, will expand the region's need for soybeans and for soybean meal. While competition between Brazil and the United States may be keen, the sale of U.S. soybean meal to EE is likely to increase moderately during 1978.

Three EE countries—Poland, Romania, and Yugoslavia—are currently eligible for CCC credit to finance sales of selected U.S. commodities. During fiscal 1977, CCC credit sales to EE totaled about \$175 million, virtually all going to Poland.

Under the CCC Export Credit sales program, commitments for fiscal 1978 are for a record \$514 million credit to Poland. The line of credit provides \$229.7 million for feed grain, \$73.2 million for

wheat, \$31 million for soybeans, \$105 million for any combination of soybean meal, linseed meal, or cottonseed meal, \$28 million for soybean meal, \$15 million for cotton, \$12 million for tallow, \$10 million for vegetable oils, \$4.3 million for tobacco, and \$5.8 million for edible soy-protein.

A \$23 million CCC credit line was established for Romania to finance purchases of U.S. soybeans. At current market prices, this line of credit would finance 100,000 tons of U.S. soybeans.

On December 15, 1977 a bill (S.2385) was introduced in the U.S. Congress designed to help spur U.S. agricultural exports. One provision would establish an intermediate credit program under the United States' CCC, allowing extension of CCC credits of 10 years from the present limit of 3 years. The second provision would allow the extension of CCC credits to nonmarket economy nations, which presently are ineligible. The passage of such legislation extending CCC credit could improve the longer term prospects of U.S.-EE agricultural trade. Supporters of the proposed legislation feel it would make CCC more competitive with other principal world grain suppliers in dealing with credit sales to EE. (*Andrew A. Duymovic*)

PLANS AND POLICIES FOR 1978

Agricultural Output to Grow

The plans announced for 1978 were designed within the scope of goals set in the 1976-1980 Five-Year Plan, but they were adjusted on the basis of results obtained in 1976 and 1977. Hungary, where agricultural production growth was highest in 1977, plans the most modest growth. Production performances in Bulgaria, Poland, and Romania were below expectation in 1977, and their goals for 1978 are the most ambitious. The following 1978 planned growth rates have been announced: Bulgaria, 5 percent; Czechoslovakia, 3.5 percent; the GDR, 3.5 percent; Hungary, 2 to 3 percent; Poland, 6.7 percent; Romania, 6.9 to 16.1 percent; and Yugoslavia 3.4 percent.

For 1978, all EE countries plan increased levels of disposable income and, in most countries, for stable meat prices implying continued expansion of domestic demand for meat. Planned increases in agricultural production either surpass or at least matches the projected increase in demand. To reduce regional net grain imports, faster growth is slated for crops than for livestock products. In Czechoslovakia, for example, the crop output plan calls for a 5.5 percent growth against a 2.6 percent gain in livestock production. The region's grain output would total about 103 million tons in 1978—10 million tons more than in 1977—if the aggregate

target is met. Bulgaria is planning the highest percentage increase, 36 percent. Past performances indicate that chances to fulfill production plans simultaneously in each country are slight.

Growth of Investment Decelerates

The region's planned growth of investment is to slow down, but a larger share of funds will be allocated for providing consumer goods than in 1977. Poland revised its original plan and lowered the share of national income to be used for investment from 26 to 24 percent. Indications are that agriculture's share in total investment will remain near last year's level, except in Poland and Yugoslavia where agriculture will receive priority consideration.

Land utilization and land improvement will continue to receive special attention. Controls have been imposed to restrict the use of arable land for nonagricultural purposes. Romania intends to reclaim about 30,000 hectares for cultivation. Area under irrigation will be expanded in all countries. The Romanian Government requested compulsory second-crop sowing on irrigated land.

Private farming is dominant in Poland and Yugoslavia (table 17). Poland recently began encouraging individual purchases of land to a limited extent. Even in Bulgaria, Hungary, and

Romania, where agricultural land is largely socialized, the Government supports household farming activities. This private production accounts for about 30 percent of all agricultural output in Hungary and Romania and 20 percent in Bulgaria. Small-scale private producers, however, are not expected to increase their output. For this reason, output in the socialized sector must grow faster than the plan indexes indicate in order to reach the announced production goals for 1978.

Fertilizer use will continue to increase. Expansion in fertilizer manufacturing capacity and a shift to compound fertilizers will assure more and better supplies for the farms. The introduction of new crop varieties and larger machines will allow more timely and efficient cultivation. Horizontal and vertical cooperation among farms and industries, and widespread specialization, in selective commodity production, may enhance productivity.

Special Policy Measures

In addition to the stated general policies, each country has introduced some special measures to improve food supply and distribution. Bulgaria divided the country into districts which, according to plan, should become self-sufficient in the supply of meats, bread, vegetables, and fruit. The first test of this program implementation will be during 1978. Czechoslovakia and the GDR are placing increased emphasis on improving feeding efficiency through the use of scientifically established feeding rations and proper utilization of roughages. In Hungary, the concern has shifted to improving food marketing and processing.

Poland's main problem is how to satisfy consumer demands for meats without causing severe economic disequilibrium. New legislation, which ties the farmers' pension to the value of commodities sold to the State, may lead to increased market supplies—particularly meat. Also, the distribution of consumer goods may improve through the recently instituted practice of leasing shops to private entrepreneurs.

Meat supplies improved somewhat in 1977 after retailers were permitted to sell meat obtained on the free-market in so-called "commercial" shops for higher prices than the meat sold in "regular" State run outlets. However, if the Polish-projected 6.6-percent increase in disposable income is realized in 1978, and retail prices remain stable, the delicate balance between supply and demand for meat will further deteriorate.

Following 1976 disturbances, a commission was appointed in Poland; this commission recently recommended that prices be fixed at a relationship closer to cost of production and realigned in order to shift demand from food to industrial consumer goods. The Polish Government, after weighing political and social consequences, opted for gradual price changes; but no timetable has been set for the increasing prices. So far, about \$3.8 billion is budgeted in 1978 to keep the retail food prices stable; this is an increase of 7 percent and constitutes 14 percent of the total budgetary expenditures.

Romania relies more on administrative power than on economic incentives to achieve its goals. Strengthening management and improving workers' discipline are some of the tools used to enforce implementation of central directives.

Yugoslavia is preoccupied with fighting inflation, and any change in the producer price payment system is supposed to serve this objective. The previous practice of a Government guaranteed purchase price for wheat, corn, and rice was abolished in mid-1977 when a more flexible producer selling price and a protective price were introduced. The prices, which have not yet been made public, are developed by formula and were scheduled to be announced last October. The protective price will be 15 percent below the established producer selling price to assure farmers a minimum price. The Government will pay this minimum price for purchases above contracted supplies if farmers are not able to obtain better prices on the free market. (Thomas A. Vankai)

Table 1--Grain trade, Eastern Europe, 1974/75-1977/78 1/

	1974/75		1975/76		1976/77 2/		1977/78 3/	
	Total	U.S.	Total	U.S.	Total	U.S.	Total	U.S.
<u>Imports</u>								
Bulgaria	1.0	0.2	0.3	0.3	0.2	--	0.1	0.1
Czechoslovakia	1.3	--	1.6	.2	2.5	0.8	1.2	.2
GDR	3.3	.7	3.4	2.5	4.5	2.9	3.3	2.0
Hungary .....	.3	--	.4	--	.2	--	.2	--
Poland	3.8	.9	5.0	2.8	6.1	2.3	7.0	3.7
Romania	1.1	.9	1.0	.1	1.5	.6	1.0	.8
Yugoslavia .....	.4	.2	.6	--	.6	--	.2	--
Total	11.2	2.9	12.3	5.9	15.6	6.6	13.0	6.8
<u>Exports</u>								
Bulgaria	--	--	0.6	--	0.2	--	0.2	--
Czechoslovakia	--	--	--	--	--	--	--	--
GDR	0.3	--	.3	--	.3	--	.3	--
Hungary	1.7	--	1.9	--	.5	--	1.2	--
Poland .....	.1	--	.1	--	.1	--	.1	--
Romania .....	.7	--	1.2	--	1.5	--	1.7	--
Yugoslavia .....	.1	--	.3	--	.4	--	.8	--
Total	2.9	--	4.4	--	3.0	--	4.3	--
<u>Net imports 4/</u>								
Bulgaria	1.0	0.2	-0.4	0.3	--	--	-0.1	0.1
Czechoslovakia	1.3	--	1.6	.2	2.5	0.8	1.2	.2
GDR	3.0	.7	3.1	2.5	4.2	2.9	3.0	2.5
Hungary	-1.4	--	-1.5	--	-3	--	-1.0	--
Poland	3.7	.9	4.9	2.8	6.0	2.3	6.9	4.7
Romania .....	.4	.9	.2	.1	--	.6	.7	.8
Yugoslavia .....	.3	.2	.3	--	.2	--	.6	--
Total	8.3	2.9	7.9	5.9	12.6	6.6	8.7	6.8

-- = No information reported, negligible or none. 1/ July-June; Rice excluded.

2/ Preliminary. 3/ Estimate. 4/ Minus denotes net exports.

Source: Foreign Agricultural Service; Economics, Statistics, and Cooperatives Service.

Table 2--Domestic production and utilization of
oilseed meal, Eastern Europe, 1974-77

Year	Oilseed meal	Eastern Europe
		<u>1,000 tons</u>
1974	Domestic production:	
	Soybean meal	244
	Sunflower meal	444
	Rapeseed meal	479
	Total	1,167
1975	Imports:	
	Total meal	3,616
	Total seed in meal equivalent	181
1975	Total use	4,964
1975	Domestic production:	
	Soybean meal	248
	Sunflower meal	375
	Rapeseed meal	680
	Total	1,303
1976	Imports:	
	Total meal	4,003
	Total seed in meal equivalent	311
1976	Total use	5,617
1976	Domestic production:	
	Soybean meal	283
	Sunflower meal	505
	Rapeseed meal	846
	Total	1,634
1977 <u>1/</u> ...	Imports:	
	Total meal	3,270
	Total seed in meal equivalent	200
	Total use	5,104

1/ Preliminary.

Table 4--Total and agricultural trade, Eastern Europe, 1974-77

Item	Bulgaria	Czecho- slovakia	CDR	Hungary	Poland	Romania	Yugo- slavia	Total
Million dollars								
Export:								
1974	3,721	7,106	11,938	4,293	8,321	4,874	3,593	43,846
1975	4,541	8,043	13,767	4,773	10,289	5,341	3,846	50,600
1966	5,200	8,989	15,504	4,954	11,024	6,138	4,607	56,416
1977 1/	5,787	8,140	16,590	5,770	12,287	7,022	5,105	NA
Import:								
1974	4,196	7,582	13,164	4,667	10,488	5,143	7,102	52,342
1975	5,236	8,744	15,407	5,630	12,545	5,342	7,269	60,173
1976	5,399	9,654	18,008	5,564	13,877	6,095	6,957	65,554
1977 1/	6,009	8,240	19,270	6,465	14,646	7,022	7,860	NA
Balance:								
1974	-475	-476	-1,226	-374	-2,167	-269	-3,509	-8,496
1975	-695	-701	-1,640	-857	-2,256	-1	-3,423	-9,573
1976	-199	-665	-2,504	-610	-2,853	43	-2,350	-9,138
1977 1/	-222	-100	-2,680	-695	-2,359	0	-2,755	NA
Agricultural export: 2/								
1974	1,226	675	685	1,063	927	1,339	505	6,420
1975	1,609	638	671	1,114	874	1,208	533	6,647
1976	1,790	676	658	1,144	1,004	863	673	6,808
Agricultural import: 2/								
1974	677	1,585	2,400	747	1,483	972	1,305	9,169
1975	700	1,525	2,500	687	1,604	838	905	8,759
1976	575	1,724	2,575	879	1,875	965	1,028	9,621
Agricultural trade balance: 2/								
1974	549	-910	-1,715	316	-556	367	-800	-2,749
1975	909	-887	-1,829	427	-730	370	-372	-2,112
1976	1,215	-1,048	-1,917	265	-871	-102	-355	-2,813

Conversion factors: \$1 = 0.966 leva, 5.80 koruny, 2.55 mark, 10.93 forints (41.35 forints since 1976), 3.32 zloty, 4.97 lei, 18 dinars.

1/ Preliminary; 9 months for Czechoslovakia.

2/ Estimate. In Bulgaria, Czechoslovakia, and Romania it includes wool products and textile yarns.

Table 6--U.S. agricultural exports to Eastern Europe, total and share of transshipments, 1970, 1975-77

Country	Unit	1970	1975	1976	1977
Bulgaria:					
Total	1,000 dollars	5,421	19,610	31,558	2,430
Share of transshipments	Percent	--	--	--	--
Czechoslovakia:					
Total	1,000 dollars	13,201	84,735	220,699	69,407
Share of transshipments	Percent	28.4	81.7	29.3	21.5
GDR:					
Total	1,000 dollars	21,716	343,728	410,825	239,831
Share of transshipments	Percent	43.6	96.9	85.8	87.0
Hungary:					
Total	1,000 dollars	20,636	40,463	22,442	44,107
Share of transshipments	Percent	2.1	--	--	23.2
Poland:					
Total	1,000 dollars	50,871	383,566	491,448	311,913
Share of transshipments	Percent	.5	4.1	2.1	6.1
Romania:					
Total	1,000 dollars	37,719	108,715	171,584	129,285
Share of transshipments	Percent	26.2	7.0	--	8.5
Yugoslavia:					
Total	1,000 dollars	44,795	43,424	39,708	76,241
Share of transshipments	Percent	4.4	--	5.6	7.8
Eastern Europe:					
Total	1,000 dollars	194,359	1,024,241	1,388,264	873,214
Share of transshipments	Percent	13.2	39.7	33.3	30.9

Table 1--Area of grains, Eastern Europe, annual 1971-77 1/

Commodity and year	Czechoslovakia	GDR	Hungary	Poland	Romania	Yugoslavia	Total Eastern Europe
1,000 hectares							
Wheat							
1971	1,013	1,103	633	1,273	2,060	2,501	10,512
1972	961	1,197	690	1,317	2,048	2,523	10,660
1973	934	1,235	696	1,294	1,962	2,358	10,176
1974	861	1,276	728	1,324	2,022	2,389	10,442
1975	819	1,183	688	1,251	1,842	2,345	9,743
1976	793	1,178	762	1,325	1,632	2,388	10,101
1977	795	1,280	760	1,311	1,834	2,269	9,853
Barley							
1971	29	234	668	127	3,711	48	4,917
1972	17	232	646	119	3,543	42	4,703
1973	16	225	646	107	3,416	34	4,540
1974	15	219	637	106	3,138	(40)	4,246
1975	17	191	593	104	2,792	(40)	3,821
1976	13	186	600	93	2,934	(40)	3,941
1977	15	210	600	91	3,116	(40)	4,140
Oats							
1971	434	851	656	298	899	330	3,748
1972	446	854	618	291	1,016	327	3,842
1973	453	873	692	287	1,083	315	4,036
1974	477	867	779	271	1,230	402	4,356
1975	575	980	929	257	1,335	442	4,878
1976	524	857	960	228	1,210	410	4,482
1977	530	850	930	224	1,235	537	4,612
Rye							
1971	75	344	230	45	1,330	128	2,407
1972	65	323	247	48	1,359	121	2,419
1973	46	278	238	37	1,271	105	2,226
1974	47	226	222	33	1,182	85	2,044
1975	50	221	243	45	1,291	70	2,190
1976	44	198	190	39	1,115	45	1,863
1977	50	190	190	32	1,100	52	1,845
Other grains							
1971	655	142	3	1,321	5	3,131	7,679
1972	689	148	9	1,392	6	3,196	7,823
1973	667	169	4	1,461	4	2,957	7,599
1974	523	167	1	1,461	5	2,963	7,376
1975	652	158	--	1,413	15	3,305	7,906
1976	731	204	--	1,339	52	3,371	8,078
1977	704	200	--	1,280	55	3,312	7,872
Other coarse grains 2/							
1971	17	--	--	26	--	28	79
1972	15	--	--	28	--	27	77
1973	16	--	--	27	--	23	73
1974	17	--	--	28	--	23	75
1975	17	--	--	27	--	22	74
1976	17	--	--	28	--	21	74
1977	16	--	--	27	--	20	71
Other grain:							
1971	1	--	132	--	447	2	600
1972	1	--	120	--	513	2	650
1973	1	1	101	--	514	3	635
1974	--	--	76	12	531	1	630
1975	--	--	58	8	589	15	679
1976	--	--	29	5	625	68	734
1977	--	--	35	3	625	140	810
Total grain:							
1971	2,214	2,674	2,322	3,090	8,452	6,168	29,952
1972	2,194	2,754	2,330	3,195	8,485	6,238	30,174
1973	2,095	2,781	2,377	3,213	8,250	5,793	29,280
1974	1,940	2,755	2,444	3,235	8,108	5,901	29,168
1975	2,135	2,733	2,513	3,105	7,864	6,239	29,298
1976	2,122	2,723	2,541	3,057	7,768	6,350	29,273
1977	2,110	2,730	2,515	2,968	7,965	6,370	29,203

-- = No information reported, negligible, or none.
() = Estimates.

1/ 1977 data are preliminary.

2/ Includes buckwheat, millet, spelt, mixed grains, and sorghum.

Table 8--Production of grains, Eastern Europe, annual 1971-77 1/

-- = No information reported, negligible, or none.

1/ 1977 data are preliminary.

2/ Includes buckwheat, millet, spelt, mixed grains, and sorghum.

-- = No information reported, negligible, or none.

2/ Includes only lucerne, clover and vetch.

-- = No information reported, negligible, or none.

2/ Derived figure.

3/ Includes only lucerne, clover and vetch.

Table 11--January livestock numbers, Eastern Europe, 1971-78 1/

Category and year	Bulgaria	Czechoslovakia	DDR	Hungary	Poland	Romania	Yugoslavia	Total Eastern Europe
					1,000 head			
Cattle, total:								
1971	1,279	4,288	5,190	1,912	10,220	5,216	5,138	33,243
1972	1,379	4,349	5,293	1,883	10,562	5,528	5,148	34,142
1973	1,441	4,466	5,379	1,893	11,265	5,767	5,366	35,577
1974	1,454	4,556	5,482	1,931	12,309	5,897	5,681	37,310
1975	1,554	4,566	5,585	2,018	12,815	5,983	5,872	38,393
1976	1,656	4,555	5,532	1,904	12,764	6,126	5,755	38,293
1977	1,722	4,654	5,471	1,881	12,002	6,351	5,641	37,722
1978	1,735	4,758	5,544	1,944	12,360	6,301	5,528	38,175
1979								
1980								
Cows:								
1971	589	1,881	2,163	763	5,829	2,276	2,774	16,275
1972	607	1,900	2,173	750	5,904	2,385	2,786	16,505
1973	620	1,906	2,169	762	6,023	2,447	2,921	16,848
1974	615	1,927	2,164	786	6,268	2,498	3,056	17,314
1975	644	1,927	2,157	797	6,350	2,537	3,195	17,607
1976	670	1,903	2,155	760	6,138	2,560	3,267	17,453
1977	691	1,898	2,146	766	5,786	2,568	3,227	17,082
1978	695	1,898	2,158	785	5,880	2,660	3,162	17,238
1979								
1980								
Pigs:								
1971	2,369	5,530	9,684	7,311	13,863	6,359	6,562	51,678
1972	2,806	5,935	9,995	7,594	16,946	7,742	6,216	57,234
1973	2,525	6,093	10,361	6,858	19,023	8,785	6,342	60,060
1974	2,431	6,266	10,849	8,011	21,451	8,987	7,401	65,396
1975	3,422	6,719	11,518	8,293	21,709	8,566	7,683	67,910
1976	3,889	6,683	11,501	6,953	21,647	8,813	6,536	66,022
1977	3,456	6,820	11,291	7,854	16,766	10,193	7,326	63,706
1978	3,400	7,510	11,757	7,900	20,591	9,732	8,200	69,090
1979								
1980								
Sheep:								
1971	9,678	981	1,598	2,316	2,661	13,818	8,703	39,755
1972	10,127	932	1,607	2,054	2,653	14,071	8,326	39,770
1973	9,920	889	1,657	1,936	2,627	14,455	7,774	39,258
1974	9,765	842	1,742	1,813	2,595	14,302	7,852	38,911
1975	9,791	811	1,847	2,021	2,660	13,929	8,115	39,234
1976	10,014	805	1,882	2,039	3,178	13,865	7,831	39,614
1977	9,723	797	1,870	2,350	3,151	14,331	7,484	39,706
1978	10,145	841	1,927	2,500	3,593	14,400	7,185	40,591
1979								
1980								
Horses:								
1971	170	131	126	222	2,569	668	1,048	4,934
1972	159	118	106	211	2,469	654	1,015	4,732
1973	148	100	94	188	2,401	631	964	4,526
1974	142	84	82	172	2,387	594	945	4,406
1975	137	71	76	163	2,330	557	922	4,256
1976	133	62	70	156	2,100	562	864	3,947
1977	128	57	68	150	2,051	560	812	3,826
1978	125	55	65	150	2,010	555	800	3,760
1979								
1980								
Poultry:								
1971	33,706	39,187	43,034	61,300	87,561	54,333	44,954	364,075
1972	34,102	38,238	43,343	58,800	88,854	61,262	44,584	369,183
1973	34,788	39,170	43,658	50,600	92,875	64,496	49,206	374,793
1974	36,939	41,232	45,667	55,300	94,227	66,511	54,685	394,561
1975	35,089	39,476	47,530	57,500	96,583	67,622	54,991	398,841
1976	38,061	40,130	47,122	56,100	99,795	67,626	54,764	414,597
1977	39,504	44,142	48,400	58,000	79,200	91,503	59,359	420,108
1978	41,100	44,774	48,400	58,000	80,000	88,573	60,250	421,097
1979								
1980								

1/ 1978 data are preliminary.

Table 22--Production of principal livestock products, eastern Europe, annual 1971-1977 1/

Commodity and year	Bulgaria	Czechoslovakia	GDR	Hungary	Poland	Romania	Yugoslavia	Total Eastern Europe
1,000 metric tons								
Beef and veal 2/:								
1971	101	272	334	203	642	212	74	1,468
1972	110	377	349	187	586	219	77	1,508
1973	126	404	368	210	627	251	80	1,606
1974	116	431	389	187	808	250	88	1,760
1975	112	431	417	229	870	260	91	1,800
1976	127	415	417	204	931	282	95	1,757
1977	120	416	462	194	876	300	96	1,714
Pork, lamb, and goat meat 2/:								
1971	102	8	10	18	29	67	52	206
1972	101	8	11	15	30	63	53	201
1973	100	8	11	17	29	69	50	199
1974	100	7	13	16	28	70	49	193
1975	90	7	14	17	26	71	56	181
1976	101	7	16	17	26	69	61	197
1977	96	6	16	18	26	70	57	189
Pork 2/:								
1971	204	624	854	753	1,357	474	611	4,467
1972	243	681	927	820	1,643	591	641	4,946
1973	223	671	970	733	1,833	674	603	5,007
1974	212	703	1,041	861	1,948	749	645	5,439
1975	329	738	1,132	892	1,851	724	646	6,212
1976	370	728	1,099	770	1,594	772	608	6,041
1977	377	737	1,088	920	1,555	772	640	6,011
Poultry meat 2/:								
1971	111	111	99	237	150	145	147	1,000
1972	108	119	107	243	172	190	144	1,003
1973	113	124	111	252	196	209	160	1,165
1974	131	129	124	272	223	238	181	1,298
1975	123	134	127	280	354	273	188	1,319
1976	130	141	132	310	299	303	204	1,519
1977	127	154	135	324	340	320	211	1,611
Total meat 2/3/:								
1971	522	1,157	1,326	1,216	2,232	898	1,102	8,453
1972	565	1,225	1,423	1,270	2,480	1,063	1,052	9,078
1973	566	1,242	1,490	1,217	2,729	1,203	1,067	9,514
1974	562	1,307	1,598	1,341	3,061	1,307	1,283	10,459
1975	657	1,349	1,718	1,422	3,062	1,328	1,329	10,865
1976	732	1,322	1,693	1,306	2,913	1,426	1,309	11,701
1977	724	1,344	1,730	1,461	2,861	1,462	1,338	10,920
Milk 4/:								
1971	1,671	4,924	7,150	1,802	15,146	3,205	2,732	26,630
1972	1,674	5,123	7,515	1,810	15,765	3,561	2,968	28,416
1973	1,708	5,430	7,738	1,957	16,243	3,784	3,257	30,117
1974	1,782	5,503	8,075	2,020	16,667	3,760	3,640	31,447
1975	1,803	5,462	8,095	1,979	16,395	3,812	3,802	31,348
1976	1,816	5,400	8,092	2,084	16,520	4,185	3,991	32,098
1977	1,900	5,530	8,100	2,330	17,100	4,645	4,580	34,185
Eggs:								
1971	1,747	3,996	4,504	3,475	7,080	3,984	2,937	27,723
1972	1,703	4,120	4,425	3,217	7,475	4,300	2,964	28,204
1973	1,736	4,254	4,554	3,285	7,437	4,655	3,201	29,122
1974	1,753	4,468	4,922	3,628	7,871	4,871	3,674	31,187
1975	1,851	4,499	5,047	4,001	8,013	5,412	3,590	32,407
1976	1,848	4,492	5,217	3,726	8,020	6,153	3,825	33,281
1977	1,900	4,639	5,280	3,820	8,550	6,158	4,000	34,347

1/ 1977 data are preliminary.

2/ Data include edible slaughter fat.

3/ Includes horse and rabbit meat.

4/ Cows milk only for Czechoslovakia, GDR, Hungary, and Poland. In GDR, milk production is given in 3.5 percent fat content equivalent.

Table 13--Trade in selected agricultural

Commodity and country	Imports							
	1971	1972	1973	1974	1975	1976	1977	1978
				1,000 metric tons				
Total grain:								
Bulgaria	195	--	146	637	653	432		
Czechoslovakia	2,033	1,550	1,552	1,088	885	1,967		
GDR	3,066	3,845	2,990	2,770	3,396	5,066		
Hungary	808	788	265	390	172	242		
Poland	2,904	3,106	3,263	4,091	3,963	6,025		
Romania 1/	366	39	212	784	551	666		
Yugoslavia	1,006	982	278	940	17	865		
Total	10,378	10,312	8,696	10,700	9,637	15,263		
Wheat:								
Bulgaria	150	--	--	77	105	32		
Czechoslovakia	1,204	1,094	950	664	515	685		
GDR	1,867	2,040	1,594	1,219	1,130	1,691		
Hungary	401	35	--	2	30	56		
Poland	1,910	1,274	1,620	1,758	1,477	2,211		
Romania 1/	334	29	184	302	86	427		
Yugoslavia	547	448	225	845	--	862		
Total	6,413	4,920	4,573	4,867	3,343	5,968		
Barley:								
Bulgaria	8	--	53	201	278	--		
Czechoslovakia	133	112	133	90	82	15		
GDR	187	675	298	104	390	795		
Hungary	209	548	199	333	101	153		
Poland	616	1,332	780	1,135	1,376	742		
Romania 1/	32	--	7	21	--	--		
Yugoslavia	125	66	10	5	15	1		
Total	1,310	2,733	1,480	1,889	2,242	1,706		
Oats:								
Bulgaria	33	--	68	359	222	375		
Czechoslovakia	480	302	469	332	283	1,260		
GDR	656	1,031	1,086	1,328	1,795	2,346		
Hungary	162	107	--	3	--	20		
Poland	267	337	684	765	634	2,035		
Romania 1/	--	10	10	461	432	72		
Yugoslavia	308	417	42	81	--	--		
Total	1,906	2,204	2,359	3,329	3,366	6,108		
Oilseeds:								
Bulgaria	6	5	2	5	3	4		
Czechoslovakia	132	120	140	129	114	139		
GDR	208	197	133	129	124	50		
Hungary	64	6	5	5	2	5		
Poland	88	108	163	206	134	90		
Romania 3/	20	19	20	20	15	220		
Yugoslavia	51	9	12	46	12	27		
Total	569	464	475	540	404	535		

Footnotes at end of table.

Comm. Files, Eastern Europe, 1971-78

Exports								Commodity and country
1971	1972	1973	1974	1975	1976	1977	1978	
1,000 metric tons								
558	633	367	149	195	453			Total grain:
35	35	33	207	73	198			Bulgaria
390	325	343	312	410	386			Czechoslovakia
112	505	1,732	1,472	1,285	1,660			GDR 1/
111	208	410	262	104	70			Hungary
702	900	1,126	712	1,163	1,053			Poland
70	22	308	315	36	449			Romania
1,978	2,828	4,400	3,429	3,266	4,875			Yugoslavia
								Total
524	400	227	139	113	553			Wheat:
--	--	--	--	--	--			Bulgaria
160	--	--	68	73	75			Czechoslovakia
92	102	923	633	952	732			GDR 1/
--	--	--	--	--	--			Hungary
236	643	776	641	702	1,356			Poland
2	--	--	4	--	--			Romania
508	1,415	1,919	1,485	1,843	2,445			Yugoslavia
								Total
--	40	16	--	--	44			Barley
33	35	33	33	48	183			Bulgaria
164	167	173	152	61	162			Czechoslovakia
--	122	88	14	--	1			GDR 1/
78	129	43	68	29	49			Hungary 2/
--	--	--	--	--	--			Poland
1	--	103	33	11	9			Romania
176	493	456	300	150	448			Yugoslavia
								Total
79	285	130	10	82	155			Corn:
--	--	--	--	--	--			Bulgaria
--	--	--	--	--	--			Czechoslovakia
26	19	693	770	319	935			GDR
--	--	--	--	--	--			Hungary
466	357	350	71	458	248			Poland
63	20	277	263	20	423			Romania
785	681	1,450	1,114	879	1,761			Yugoslavia
								Total
95	95	35	2	7	11			Oilseeds:
3	2	3	2	1	1			Bulgaria
--	--	--	--	--	--			Czechoslovakia
80	36	27	30	45	41			GDR
61	10	57	3	76	175			Hungary
35	78	42	29	--	--			Poland
33	20	15	30	6	8			Romania 2/
257	241	179	96	135	236			Yugoslavia
								Total

--Continued

Table 13--Imports in selected agricultural

Commodity and country	Imports						
	1971	1972	1973	1974	1975	1976	1977
	1,000 metric tons						
Cattle							
Bulgaria	1	--	--	--	2	--	--
Czechoslovakia	55	58	40	46	49	53	53
FRG	99	121	98	127	97	104	104
Hungary	31	7	31	20	17	17	17
Poland	65	69	66	68	61	87	87
Romania	1	1	1	5	7	10	10
Yugoslavia	134	128	48	59	130	109	109
Total	375	424	274	325	363	380	380
Beef meat							
Bulgaria	137	179	170	302	218	324	324
Czechoslovakia	305	501	630	591	652	671	671
FRG	637	834	769	829	875	875	875
Hungary	401	377	380	580	505	542	542
Poland	317	545	724	794	948	1,024	1,024
Romania	51	117	215	227	273	320	320
Yugoslavia	193	150	200	272	150	247	247
Total	2,090	2,703	3,088	3,595	3,621	4,003	4,003
Pork							
Bulgaria	61	56	61	58	51	48	48
Czechoslovakia	106	108	104	119	116	95	95
FRG	91	91	86	99	100	79	79
Hungary	41	67	73	74	92	87	87
Poland	145	157	145	152	160	145	145
Romania	91	97	108	104	111	108	108
Yugoslavia	79	86	94	109	85	103	103
Total	64	662	671	715	716	665	665
Other cattle							
Bulgaria	486	384	366	443	377	393	393
Czechoslovakia	2,444	2,451	2,452	2,122	2,147	2,208	2,208
FRG	805	835	1,160	695	710	760	760
Hungary	1,063	1,476	1,716	1,852	1,648	1,601	1,601
Poland	2,265	2,665	3,050	2,575	2,350	2,735	2,735
Romania	1,675	2,335	3,244	1,769	1,761	1,899	1,899
Yugoslavia	1,020	1,165	1,140	1,200	1,095	1,350	1,350
Total	9,757	11,311	13,128	10,656	10,088	9,946	9,946
Meat and meat products							
Bulgaria	15	10	15	39	19	17	17
Czechoslovakia	76	46	22	41	32	22	22
FRG	56	47	43	25	23	20	20
Hungary	16	14	27	19	12	27	27
Poland	153	65	55	6	16	46	46
Romania	46	43	8	10	3	11	11
Yugoslavia	5	11	46	20	8	10	10
Total	367	236	216	160	113	153	153

Footnotes at end of table.

Exports, Eastern Europe: 1971-76--Continued

Exports							Commodity and Country
1971	1972	1973	1974	1975	1976	1977	1978
1,000 metric tons							
							Vegetable oil, cattle:
20	26	19	23	21	23		Bulgaria
2	1	1	1	1	1		Czechoslovakia
--	--	--	--	--	--		GDR
44	41	41	39	38	39		Hungary
17	62	47	47	57	76		Poland
132	129	142	165	141	87		Romania
6	1	3	7	--	--		Yugoslavia
27	260	253	282	258	226		Total
							Wheat meal 4/
36	40	42	--	--	68		Bulgaria
14	29	27	27	35	11		Czechoslovakia
--	--	--	--	--	--		GDR
98	60	117	171	163	366		Hungary
30	14	--	6	4	2		Poland
--	--	--	--	--	--		Romania
8	9	--	--	--	6		Yugoslavia
186	152	186	204	202	453		Total
							Cotton:
9	10	6	2	1	2		Bulgaria
16	--	--	--	--	4		Czechoslovakia
--	--	--	--	--	--		GDR
--	--	--	--	--	--		Hungary
--	--	--	--	4	12		Poland
--	--	--	--	--	--		Romania
--	--	--	--	--	--		Yugoslavia
25	10	6	2	5	18		Total
							Hides, cattle 2/
137	2	--	--	--	7		Bulgaria
--	--	--	--	--	--		Czechoslovakia
--	--	--	--	--	--		GDR
--	--	--	--	--	--		Hungary
140	130	75	85	140	--		Poland 6/
--	--	--	--	--	--		Romania
--	--	--	--	--	--		Yugoslavia
277	132	75	85	140	--		Total
							Meat and meat products 1/:
67	74	65	61	99	118		Bulgaria
30	25	50	9	16	10		Czechoslovakia
60	71	68	39	69	110		GDR 1/ 2/
162	163	134	201	249	210		Hungary
174	173	194	234	209	157		Poland
55	69	100	133	165	165		Romania
102	108	91	57	85	88		Yugoslavia
650	683	702	734	892	748		Total

--Continued

Table 2--(Cont'd) SOYBEAN EXPORTS (Cont'd)

Country	Exports					
	1971	1972	1973	1974	1975	1976
	1,000 metric tons					
Bulgaria	305	100	132	210	295	500
Czechoslovakia	197	145	148	105	48	100
France	432	441	500	288	100	100
Hungary	108	147	174	100	194	111
Poland	45	-	28	50	41	10
Romania	119	70	78	90	48	111
Soviet Union	10	295	480	60	147	50
Total	1,036	1,117	1,300	1,071	943	1,000
Bulgaria	0	10	5	7	0	4
Czechoslovakia	10	1	10	10	14	1
France	19	13	12	20	-	1
Hungary	8	0	9	5	-	7
Poland	-	-	7	4	10	11
Romania	0	-	-	1	-	-
Soviet Union	0	-	1	-	1	-
Total	37	24	42	47	25	34

-- = No information reported, negligible, or none.

1/ As reported by trading partners.

2/ As reported by FAO.

3/ Soybeans only as reported by trading partners.

4/ Includes millfeed.

Table 14--Volume and value of U.S. agricultural exports

Commodity and country	1971	1972	1973	1974	1975	1976	1977 <u>2/</u>	1978
	<u>1,000 metric tons</u>							
Wheat:								
Bulgaria	--	--	--	--	--	--	--	--
Czechoslovakia:	--	--	74	--	9	143	--	--
GDR	--	146	418	11	335	683	140	--
Hungary	--	--	--	--	--	--	--	--
Poland	--	142	837	199	502	698	742	--
Romania	334	29	--	--	86	427	205	--
Yugoslavia	382	396	268	146	--	--	--	--
Total	716	713	1,597	356	932	1,951	1,087	--
Feed grains:								
Bulgaria	--	--	--	64	115	246	--	--
Czechoslovakia:	259	98	46	5	--	769	81	--
GDR	403	556	742	1,164	1,626	2,051	1,281	--
Hungary	--	--	24	--	--	--	77	--
Poland	459	306	908	697	1,471	2,101	1,554	--
Romania	32	183	121	512	534	239	313	--
Yugoslavia	316	420	--	52	--	--	--	--
Total	1,469	1,563	1,841	2,494	3,746	5,406	3,306	--
Total grains:								
Bulgaria	--	--	--	64	115	246	--	--
Czechoslovakia:	259	98	120	5	10	912	81	--
GDR	403	702	1,160	1,175	1,961	2,734	1,421	--
Hungary	--	--	24	--	--	--	77	--
Poland	459	448	1,745	896	1,973	2,799	2,296	--
Romania	366	212	121	512	620	666	518	--
Yugoslavia	698	816	268	198	--	--	--	--
Total	2,185	2,276	3,438	2,850	4,679	7,357	4,393	--
Soybeans:								
Bulgaria	--	--	--	--	--	--	--	--
Czechoslovakia:	9	72	16	106	62	--	--	--
GDR	15	--	--	58	--	--	--	--
Hungary	12	--	--	--	--	--	--	--
Poland	68	106	148	126	120	56	--	--
Romania	--	--	20	--	16	220	137	--
Yugoslavia	45	--	--	--	--	1	96	--
Total	149	178	184	290	198	277	233	--
Vegetable oil:								
Bulgaria	--	--	--	--	--	--	--	--
Czechoslovakia:	--	--	--	--	--	--	--	--
GDR	--	--	--	--	--	6	1	--
Hungary	--	--	--	--	--	--	--	--
Poland	25	37	42	9	12	10	--	--
Romania	--	--	--	--	--	--	--	--
Yugoslavia	89	106	32	40	49	--	--	--
Total	114	143	74	49	61	16	1	--

Footnotes at end of table.

to Eastern Europe, including transshipments, 1971-77 1/

1971	1972	1973	1974	1975	1976	1977 2/	1978	Commodity and Country
1,000 U.S. dollars								
--	--	--	--	--	--	--	--	:Wheat:
--	--	4,958	--	1,576	21,400	--	--	: Bulgaria
19	6,290	33,760	2,244	47,745	106,275	16,321	--	: Czechoslovakia
--	--	--	--	--	--	--	--	: GDR
--	6,610	66,319	18,589	80,296	101,640	68,435	--	: Hungary
19,539	1,440	--	--	11,793	48,453	19,157	--	: Poland
23,552	22,513	49,562	24,395	--	--	--	--	: Romania
43,110	36,853	154,599	45,228	141,410	277,768	103,913	--	: Yugoslavia
								: Total
1	--	--	9,995	14,780	28,456	--	--	:Feed grains:
15,840	4,962	3,066	672	39	91,450	8,845	--	: Bulgaria
22,488	30,500	68,188	149,918	221,843	252,863	139,298	--	: Czechoslovakia
--	--	2,541	759	116	411	9,427	--	: GDR
26,008	16,331	71,959	86,651	185,606	252,237	147,983	--	: Hungary
1,575	9,621	9,905	70,451	69,585	25,586	27,082	--	: Poland
18,057	22,537	5	7,510	--	--	--	--	: Romania
83,969	61,414	155,664	325,956	491,969	651,003	332,635	--	: Yugoslavia
								: Total
1	--	--	9,995	14,780	28,456	--	--	:Total grain:
15,840	4,962	8,024	672	1,615	112,850	8,845	--	: Bulgaria
22,507	36,790	101,948	152,162	269,588	359,138	155,619	--	: Czechoslovakia
--	--	2,541	759	116	411	9,427	--	: GDR
26,008	22,941	138,278	105,240	265,902	353,877	216,419	--	: Hungary
21,114	11,061	9,905	70,451	81,378	74,039	46,239	--	: Poland
41,609	45,050	49,567	31,905	--	--	--	--	: Romania
127,079	120,804	310,263	371,184	633,379	928,771	436,549	--	: Yugoslavia
								: Total
--	--	69	--	--	--	285	--	:Soybeans:
1,021	9,002	3,065	20,789	15,256	--	--	--	: Bulgaria
1,662	--	--	11,282	--	--	--	--	: Czechoslovakia
1,452	--	--	--	--	--	--	--	: GDR
7,665	12,924	28,626	36,151	31,666	10,796	--	--	: Hungary
--	--	5,745	--	3,506	45,282	38,646	--	: Poland
5,245	3	--	--	524	210	23,476	--	: Romania
17,045	21,929	37,505	68,222	50,952	56,288	62,407	--	: Yugoslavia
								: Total
--	--	--	--	--	--	--	--	:Vegetable oil:
--	155	--	--	--	--	--	--	: Bulgaria
--	--	--	--	--	4,149	720	--	: Czechoslovakia
--	--	--	--	--	--	--	--	: GDR
5,701	7,287	13,192	7,373	11,126	4,726	--	--	: Hungary
--	--	--	--	--	--	--	--	: Poland
26,743	28,521	8,590	24,963	34,570	--	--	--	: Romania
32,444	35,363	21,782	32,336	45,696	8,875	720	--	: Yugoslavia
								: Total

--Continued

Table 14--Agricultural exports, 1971-1978

Commodity	1971	1972	1973	1974	1975	1976	1977 2/	1978
Country								
	1,000 metric tons							
Wool, animal								
Bulgaria	10	--	--	16	24	11	--	
Czechoslovakia ...	79	125	180	165	308	475	192	
DDR	23	--	109	216	293	230	375	
Hungary	148	57	86	121	196	71	86	
Poland	92	114	369	271	278	392	178	
Romania	--	51	168	103	13	98	--	
Yugoslavia	117	135	168	222	13	181	137	
Total	460	462	1,080	1,114	1,077	1,459	1,002	
Wool, excluding								
Wool 2/:								
Bulgaria	--	--	--	--	--	--	--	
Czechoslovakia ...	--	--	--	--	--	--	--	
DDR	--	--	--	--	--	--	--	
Hungary	--	--	--	--	--	--	--	
Poland	--	47	51	31	20	32	11	
Romania	57	44	72	89	44	--	17	
Yugoslavia	--	--	--	--	--	--	--	
Total	59	91	123	120	64	42	38	
Cattle hides 4/:								
Bulgaria	5	71	9	42	20	49	31	
Czechoslovakia ...	692	852	804	635	877	678	680	
DDR	20	--	20	2	15	9	43	
Hungary	100	93	113	286	158	170	177	
Poland	474	545	719	638	788	550	433	
Romania	571	1,200	1,006	1,777	1,226	1,051	1,472	
Yugoslavia	228	207	233	220	110	72	471	
Total	1,120	3,968	3,900	3,600	3,200	3,298	3,358	

to Eastern Europe, including transshipments, 1971-77 1/

1971	1972	1973	1974	1975	1976	1977 2/	1978	Commodity and country
1,000 U.S. dollars								
1,033	--	--	3,181	3,544	1,590	--	--	:Oilcake and meal:
7,230	14,634	38,465	33,290	50,824	81,131	36,046	--	: Bulgaria
2,153	--	26,925	45,966	51,964	41,795	78,379	--	: Czechoslovakia
15,094	6,619	14,721	26,226	34,909	14,521	22,472	--	: GDR
9,395	13,007	78,576	62,993	37,998	74,910	41,262	--	: Hungary
--	5,513	28,449	25,455	1,886	17,702	10,980	--	: Poland
11,940	15,939	35,222	48,155	4,327	29,176	28,789	--	: Romania
46,845	55,712	222,358	245,266	185,452	260,825	217,928	--	: Yugoslavia
								: Total
								: Cotton, excluding
								: linters:
--	--	--	--	--	--	--	--	: Bulgaria
--	--	--	--	--	--	--	--	: Czechoslovakia
--	--	--	--	--	--	--	--	: GDR
--	--	--	--	--	--	--	--	: Hungary
--	7,736	8,448	9,262	4,131	9,842	3,949	--	: Poland
8,060	7,387	11,604	38,818	12,206	--	6,548	--	: Romania
286	--	--	--	--	--	--	--	: Yugoslavia
8,346	15,123	20,052	48,080	16,337	9,842	10,497	--	: Total
								: Cattle hides:
50	911	98	622	275	746	583	--	: Bulgaria
5,412	13,022	15,904	9,678	8,034	11,116	13,049	--	: Czechoslovakia
228	--	274	45	195	159	655	--	: GDR
906	1,154	1,686	4,213	1,432	3,486	4,349	--	: Hungary
3,767	8,580	15,641	9,739	7,425	6,292	9,106	--	: Poland
4,389	19,617	18,103	24,081	9,693	26,517	26,658	--	: Romania
1,912	3,072	4,441	4,212	1,548	5,080	10,925	--	: Yugoslavia
16,664	46,356	56,147	52,590	28,602	53,396	65,325	--	: Total
								: Other:
27	842	1,786	1,949	1,011	766	1,562	--	: Bulgaria
1,009	8,055	5,696	5,650	9,006	15,602	11,467	--	: Czechoslovakia
1,631	4,205	3,297	5,585	21,981	5,584	4,458	--	: GDR
1,480	3,628	7,650	6,550	4,006	4,024	7,859	--	: Hungary
10,547	12,712	19,039	37,284	25,318	31,005	41,177	--	: Poland
1,016	1,245	1,840	278	46	8,044	215	--	: Romania
4,646	4,717	5,291	6,304	2,455	5,242	13,051	--	: Yugoslavia
20,356	35,404	44,569	63,600	63,823	70,267	79,789	--	: Total
								: Total agricultural
								: exports:
1,111	1,753	1,953	15,747	19,610	31,558	2,430	--	: Bulgaria
30,512	49,830	71,154	70,079	84,735	220,699	69,407	--	: Czechoslovakia
28,181	40,995	132,414	215,040	343,728	410,825	239,831	--	: GDR
18,932	11,401	26,598	37,748	40,463	22,442	44,107	--	: Hungary
63,083	85,187	301,800	268,042	383,566	491,448	311,913	--	: Poland
34,579	44,823	75,646	159,083	108,715	171,584	129,285	--	: Romania
92,381	97,302	103,111	115,539	43,424	39,708	76,241	--	: Yugoslavia
267,779	331,291	712,676	881,278	1,024,241	1,388,264	873,214	--	: Total

1/ Including transshipments through Canada, Netherlands, and West Germany.

2/ Preliminary.

3/ Running bales.

4/ Thousand pieces.

Table 15--Volume and value of U.S. agricultural imports from Eastern Europe, 1971-77

Commodities and country	1971	1972	1973	1974	1975	1976	1977	1978
<u>1,000 metric tons</u>								
Processed meat:								
Bulgaria	0.2	0.3	--	0.1	0.2	--	--	--
Czechoslovakia	0.8	0.3	0.1	0.4	0.2	0.6	0.7	0.7
GDR	--	--	--	--	--	--	--	--
Hungary	2.1	2.8	2.3	3.6	4.6	6.7	7.0	7.0
Poland	25.0	30.3	28.1	29.4	38.3	38.1	34.1	34.1
Romania	0.2	2.0	3.3	4.9	3.6	5.5	6.0	6.0
Yugoslavia	5.2	6.9	8.7	9.0	12.1	13.8	15.7	15.7
Total	33.5	42.6	42.5	47.4	59.0	64.8	63.8	63.8
<u>1,000 U.S. dollars</u>								
Processed meat:								
Bulgaria	190	286	--	284	383	--	--	--
Czechoslovakia	1,287	433	312	736	443	1,960	2,112	2,112
GDR	57	25	--	--	40	106	100	100
Hungary	3,327	4,787	5,153	7,418	12,475	10,798	20,013	20,013
Poland	43,398	52,801	71,995	69,918	105,965	126,993	107,704	107,704
Romania	287	2,845	6,319	9,930	8,349	12,998	14,756	14,756
Yugoslavia	8,618	11,131	22,563	20,758	35,652	44,342	47,738	47,738
Total	57,164	72,308	106,342	109,044	163,307	206,197	192,423	192,423
Other products:								
Bulgaria	1,606	2,055	3,199	3,361	3,693	10,688	23,414	23,414
Czechoslovakia	637	667	967	1,645	1,434	2,004	3,310	3,310
GDR	179	159	556	1,003	532	797	1,604	1,604
Hungary	1,199	875	1,459	2,262	1,198	2,769	3,470	3,470
Poland	6,220	11,771	15,447	17,879	12,550	17,225	17,673	17,673
Romania	1,414	2,434	2,152	1,820	3,800	3,080	5,784	5,784
Yugoslavia	22,471	21,081	21,867	24,813	26,788	32,703	37,951	37,951
Total	33,726	39,042	45,647	52,783	49,995	69,266	93,206	93,206
Total:								
Bulgaria	1,796	2,341	3,199	3,645	4,076	10,688	23,414	23,414
Czechoslovakia	1,924	1,100	1,279	2,381	1,877	3,964	5,422	5,422
GDR	236	184	556	1,003	572	903	1,704	1,704
Hungary	4,526	5,662	6,612	9,680	13,673	22,567	23,483	23,483
Poland	49,618	64,572	87,442	87,797	118,515	144,218	125,377	125,377
Romania	1,701	5,279	8,471	11,750	12,149	16,078	20,540	20,540
Yugoslavia	31,089	32,212	44,430	45,571	62,440	77,045	85,689	85,689
Total	90,890	111,350	151,989	161,827	213,302	275,463	285,629	285,629

Table 10--Per capita consumption of selected foods, Eastern Europe 1/, 1971-76

Item	Bulgaria	Czechoslovakia	GDR	Hungary	Poland	Yugoslavia
<u>Kilograms</u>						
Total meat 2/:						
1971	40.2	73.7	68.5	59.5	63.9	37.6
1972	51.7	75.8	70.8	61.5	67.2	37.8
1973	52.4	76.7	73.5	63.7	70.5	38.5
1974	53.4	78.4	75.3	66.2	73.8	43.7
1975	60.6	81.1	77.8	68.0	78.4	48.3
1976	64.5	81.4	80.7	3/70.0	78.0	--
1977						
1978						
Eggs 4/:						
1971	127.0	294.0	246.0	258.0	193.0	145.0
1972	126.0	273.0	240.0	260.0	196.0	149.0
1973	135.0	293.0	250.0	264.0	200.0	154.0
1974	140.0	293.0	264.0	270.0	205.0	162.0
1975	146.0	297.0	269.0	274.0	209.0	166.0
1976	149.0	294.0	269.0	270.0	214.0	--
1977						
1978						
Vegetable oil:						
1971	13.0	6.0	2.2	1.9	5.6	10.6
1972	12.9	6.1	2.3	2.2	5.8	9.7
1973	13.0	6.1	2.0	2.5	6.2	10.1
1974	13.7	6.1	2.0	2.8	6.5	10.8
1975	14.1	6.7	2.0	2.9	6.5	10.6
1976	14.1	6.6	2.5	5/5.3	6.8	--
1977						
1978						
Sugar:						
1971	33.0	37.0	34.4	34.5	39.6	26.5
1972	31.0	37.7	35.5	35.5	40.9	29.1
1973	33.0	38.6	37.1	37.1	42.0	29.4
1974	33.2	38.6	37.7	37.7	43.9	33.1
1975	32.0	38.0	39.5	39.5	43.2	32.8
1976	34.5	38.2	38.4	33.0	43.9	--
1977						
1978						
Grain (in flour equivalent):						
1971	172.0	113.0	97.0	124.0	128.0	185.0
1972	173.0	111.0	96.0	122.0	127.0	186.0
1973	173.0	109.0	94.0	120.0	125.0	181.0
1974	165.0	106.0	94.0	120.0	123.0	188.0
1975	162.0	108.0	95.0	118.0	120.0	183.0
1976	164.0	108.0	95.0	6/120.0	119.0	--
1977						
1978						
Vegetables:						
1971	118.0	70.0	84.0	83.0	86.0	75.0
1972	116.0	74.0	93.0	83.0	84.0	76.0
1973	116.0	71.0	94.0	87.0	93.0	86.0
1974	125.0	76.0	88.0	87.0	84.0	92.0
1975	127.0	74.0	90.0	85.0	94.0	79.0
1976	114.0	70.0	84.0	1/153.0	88.0	--
1977						
1978						
Potatoes:						
1971	29.0	109.0	151.0	72.0	189.0	69.0
1972	29.0	106.0	146.0	69.0	187.0	63.0
1973	27.0	106.0	145.6	67.0	183.0	71.0
1974	27.0	108.0	141.0	66.0	177.0	71.0
1975	23.0	96.0	142.0	68.0	173.0	66.0
1976	25.0	100.0	144.0	64.0	171.0	--
1977						
1978						

-- = No information reported, negligible, or none.

1/ Data not available for Romania.

2/ Including fat except in Hungary and Yugoslavia.

3/ Includes fish and fish products.

4/ Numbers.

5/ Includes margarine.

6/ Includes rice.

7/ Includes fruits.

Table 17--Summary of descriptive data, Eastern Europe, 1976

Country	Land		Socialized		Population		Labor force		GNP 1/	
	Total	Agricul- tural	Arable	agricul- tural land	mid- year	Total 2/ year	Total 2/ year	Agricul- tural 2/	Total	Per capita
	1,000 hectares		Percent		Millions		Millions		Billion	
Bulgaria	11,091	5,955	4,350	99	8.8	3.9	0.9	\$ 20.9	\$2,375	
Czechoslovakia	12,788	6,990	5,258	94	14.9	7.1	1.0	58.0	3,893	
GDR	10,833	6,293	4,998	92	16.8	8.0	.9	66.2	3,940	
Hungary	9,303	6,757	5,471	93	10.6	5.1	1.0	26.8	2,528	
Poland	31,268	19,151	15,038	22	34.4	17.0	5.2	92.2	2,680	
Romania	23,750	14,955	10,518	91	21.4	10.2	3.6	52.6	2,447	
Yugoslavia	25,580	14,321	8,005	15	21.6	10.3	5.4	35.3	1,633	
Total	424,613	74,422	53,638	--	128.5	61.6	18.0	352.0	2,739	

1/ U.S. Department of Commerce data for CEMA members, OECD data for Yugoslavia.

2/ Include self-employed farmers.

UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C. 20250

POSTAGE AND FEES PAID
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